



Report on Customer Service FISCAL YEARS 2017-2018

June 2018

REPORT ON CUSTOMER SERVICE
Fiscal Years 2017-2018

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Introduction

ERS offers competitive benefits to enhance the lives of its members.

The ERS Customer Benefits Department handles approximately 431,000 direct member interactions annually regarding insurance and retirement benefits through incoming phone calls, emails and member visits.

We offer 24-hour self-service options, including our telephone interactive voice response (IVR) system, to provide information regarding retirement account balance and service credit. In addition, our online tool, ERS OnLine, allows members to obtain information about their benefits and make changes or updates to their personal information.

It is important to ERS that we are meeting the expectations of our members. Therefore, we have developed a comprehensive quality improvement program that includes satisfaction surveys to assess our performance.

The results of our member satisfaction surveys are very positive.

- Ninety-three percent of survey respondents rate the ERS telephone/email representative as courteous and professional.
- Visitors to ERS give their experience a 100% satisfaction rate.
- New retirees rate ERS' handling of their first annuity payment with a 98% satisfaction rate.

Providing our customers with the highest level of service—and listening to what they have to say—is our way to honor the service of Texas state employees and retirees.

ERS Customer Inventory

The current General Appropriations Act enumerates six budget strategies relevant to the programs described below.

(Data are primarily from the ERS Comprehensive Annual Financial Report for Fiscal Year 2017.)

Strategy A.1.1. ERS Retirement Plan

- Active employees — 141,629
- Retired employees — 107,530
- Inactive members — 112,192
(terminated employees who retain ERS membership)

Strategy A.1.3. JRS Retirement Plan 2

- Active officers — 557
- Retired officers — 378

Strategy A.1.4. JRS Retirement Plan 1

- Active officers — 10
- Retired officers — 366

Strategy A.1.5. Public Safety Death Benefits Program – Chapter 615

- Surviving spouse lump-sum benefits awarded — 29
- Guardians receiving payments on behalf of surviving children — 111

Strategy A.1.6. ERS Retiree Death Benefit Program

- 1,568 retiree deaths in FY17

Strategy B.1.1. Group Benefits Program for Insurance (GBP)

534,096 members and participants:

- Active employees — approximately 40.2% of the total
- Retired employees — approximately 20.5% of the total
- Dependents/others — approximately 39.3% of the total

Strategy B.1.2. Probation Health Insurance

Included in Strategy B.1.1

Customer Satisfaction Surveys

ERS conducted a random sample of email and phone call interactions with 85,335 surveys sent during the period of September 1, 2016 through April 30, 2018. We received 10,214 survey responses, representing a 11.9% response rate for these interactions. The ERS representatives conducting these interactions are unaware of which calls are selected to receive the survey.

The survey results allow ERS to focus on key performance areas and to identify opportunities to improve our service to members. These surveys are evaluated as they are received to identify trends quickly, and are analyzed to assess overall performance and to design training programs to address areas that need improvement.

Following are questions from the survey.

Question 1 – Overall, I am satisfied with the service I received from ERS.

Question 2 –The ERS representative was courteous and professional.

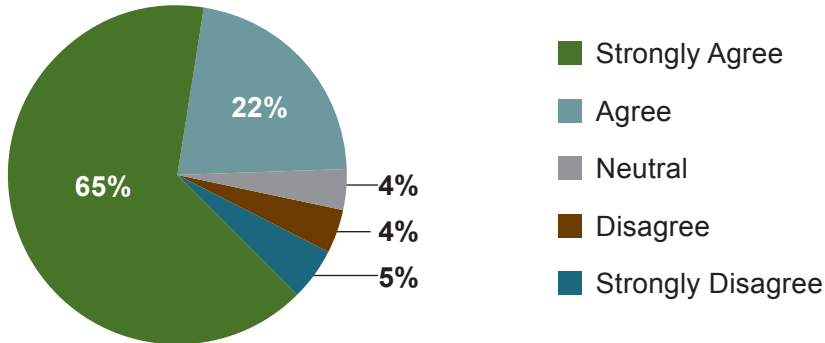
Question 3 – The ERS representative answered my questions in terms I understood.

Question 4 – The ERS representative answered all of my questions completely.

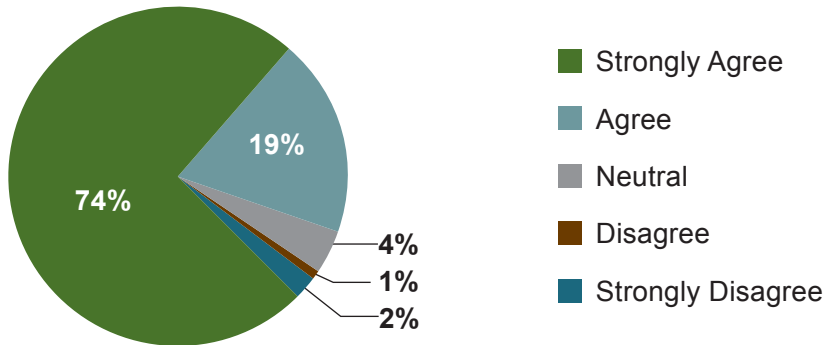
Customer Satisfaction Surveys

Contact Center Assistance Results

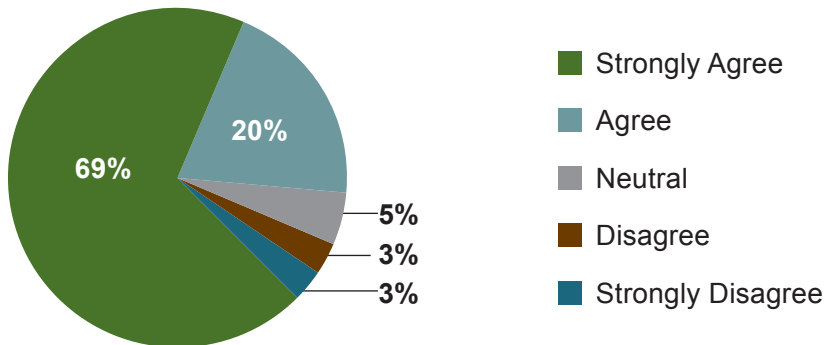
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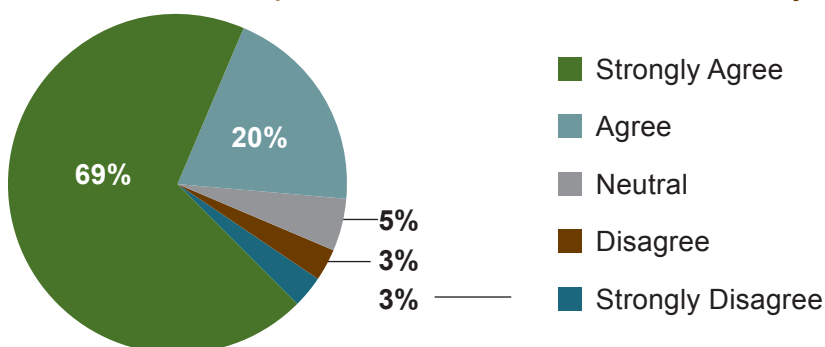
Question 2 –The ERS representative was courteous and professional.



Question 3 – The ERS representative answered my questions in terms I understood.



Question 4 – The ERS representative answered all of my questions completely.



Targeted Surveys

Annuity Check Payment Services

In FY17, ERS paid more than \$2 billion in annuity payments to 107,530 retired state employees and beneficiaries. Our customers rely on the funds they have earned and have high expectations for prompt and accurate payment.

ERS sends every new annuitant a satisfaction survey 60 days after retirement. We target a specific service, sending the survey shortly after the service is complete. Among new annuitants, 23% completed and returned the survey, which meets statistical validity requirements. The surveys are returned via fax or mail.

The following is a sample survey.

ERS is committed to providing excellent service to our customers. We know how important prompt and correct payment of your annuity is to you. As a new retiree, we want you to tell us how we're doing. If you

have any questions that require a response from ERS, please include your name and contact information, otherwise, this is an anonymous survey. Thank you for taking a few minutes to complete this survey.

- 1. Did ERS inform you about the payment process?**
 Yes No Not Sure
 - 2. Did you receive retirement counseling from ERS?**
 Yes No
 - 3. Did you receive your annuity check in the timeframe you expected?**
 Sooner When Expected Later
 - 4. Was your annuity check for the amount that you expected?**
 More Amount Expected Less
 - 5. Overall, how satisfied are you with your annuity check delivery?**
 Not satisfied Satisfied Extremely satisfied
-

Targeted Surveys

Annuity Check Payment Services Results

Cumulative Annuity Survey September 1, 2016 through April 30, 2018

Did ERS inform you about the payment process?	Yes	No	Not Sure		TOTAL
	96%	2%	2%		100%

Did you receive retirement counseling from ERS?	Yes/ Individual	Yes/ Phone	Yes/ Group	No	
	28%	66%	1%	5%	100%

Did you receive your annuity check in the time frame you expected?	Sooner	When Expected	Later		
	9%	87%	4%		100%

Was your annuity check for the amount you expected?	More	Amount Expected	Less		
	5%	88%	7%		100%

Overall, how satisfied are you with your annuity check delivery?	Extremely Satisfied	Satisfied	Not Satisfied	No Comment/ Other	
	60%	38%	1%	1%	100%

Total % Satisfied	98%				
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Targeted Surveys

Personal Benefit Counseling Services

Cumulative Customer Satisfaction Survey September 1, 2016 through April 30, 2018

	Strongly Agree/ Agree	Strongly Disagree/ Disagree	No Opinion	Total
I received quality service by ERS staff.	99.4%	0.6%	0.0%	100%
I received courteous service by ERS staff.	99.4%	0.6%	0.0%	100%
The ERS staff member I visited was knowledgeable.	99.2%	0.5%	0.3%	100%
The ERS staff member I visited was receptive to my questions.	99.2%	0.5%	0.3%	100%
The materials I received were useful.	98.9%	0.8%	0.3%	100%
The waiting area was clean and comfortable.	99.7%	0.3%	0.0%	100%
The office was clean, comfortable and private.	99.2%	0.3%	0.5%	100%
The receptionist was polite.	99.7%	0.3%	0.0%	100%
The receptionist provided assistance.	99.2%	0.3%	0.5%	100%
The receptionist was sensitive to confidential matters.	97.2%	0.3%	2.5%	100%
I am pleased with the overall quality of service.	99.4%	0.6%	0.0%	100%



Mission

ERS offers competitive benefits to enhance the lives of its members.



Philosophy

ERS prudently and professionally manages the trust funds and programs on behalf of its members. Benefits are an important part of the compensation of State of Texas employees, contributing to their financial security and well-being throughout their lives. We operate in an ethical, cost-effective manner, providing valuable and reliable service delivered by highly qualified staff.



Principles

Trust

Earn and maintain the confidence of our stakeholders.

Integrity

Make ethical and prudent decisions.

Service

Deliver quality and respectful service to all participants.

Adaptability

Ably adjust to different conditions.

Communication

Exchange information in a consistent, concise and clear manner.

Stewardship

Prudently manage resources.

Innovation

Embrace new ideas and concepts.

Collaboration

Exhibit teamwork in accomplishing the task at hand





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